

Dollar Range Card

- A** ...\$1 - \$100
- B** ...\$101 - \$500
- C** ...\$501 - \$1,000
- D** ...\$1,001 - \$2,500

.....

- E** ...\$2,501 - \$5,000
- F** ...\$5,001 - \$7,500
- G** ...\$7,501 - \$10,000
- H** ...\$10,001 - \$25,000

.....

- I** ...\$25,001 - \$50,000
- J** ...\$50,001 - \$75,000
- K** ...\$75,001 - \$100,000
- L** ...\$100,001 - \$250,000
- M** ...\$250,001 - \$500,000

.....

- N** ...\$500,001 - \$1 million
- O** ...\$1 million - \$5 million
- P** ...\$5 million - \$10 million
- Q** ...\$10 million - \$25 million

.....

- R** ...\$25 million - \$50 million
- S** ...\$50 million - \$100 million
- T** ...More than \$100 million

Card # 1

1	2	3	4	5
Almost no searching		Moderate searching		A great deal of searching

Card #2

Call around

Newspapers/Magazines

Material in the mail

Television/Radio

Internet/Online service

Advertisements

Friend/Relative

Lawyer

Accountant

Banker

Broker

Financial Planner

Other

Never borrow

Do not save or invest

Card #3

Commercial bank

Savings & Loan or Savings bank

Credit Union

Mortgage Company

Finance or Loan Company

Brokerage

Broad Financial Services Company

Other

Card #4

Check written on institution

ATM/Cash Machine/Debit Card

In-person

Mail

Phone – Talking

Phone – Using touchtone service

Automatic deposit or withdrawal

Computer/Internet/Online services

Other electronic transfer

Other

Don't do regular business

Card #5

Personal savings or assets

Credit card (personal or business)

Personal loan from a bank or savings institution

Personal loan from a credit union

Personal loan from some other type of institution or investor

Business loan from a bank or savings institution

Business loan from a credit union

Business loan from some other type of institution or investor

Other

Card #6

Business checking or share draft accounts

Business savings accounts

Business lines of credit

Business mortgages

Other business loans or leases

Business credit cards

Credit or debit card payment processing

Other

Card #7

Next few months

Next year

Next few years

Next 5 –10 years

Longer than 10 years

Card #8

Take substantial financial risks expecting to earn substantial returns

Take above average financial risks expecting to earn above average returns

Take average financial risks expecting to earn average returns

Not willing to take any financial risks

Card #9

Don't save – usually spend more than income

Don't save – usually spend about as much as income

Save whatever is left over at the end of the month –
no regular plan

Save income of one family member, spend the other

Spend regular income, save other income

Save regularly by putting money aside each month

Card #10

Retirement Assets

Retirement assets associated with jobs

Current Job Pensions

- 401(k) and other account plans
- Plans that provide monthly retirement income
- Hybrid plans

Past Job Pensions

- Currently receiving benefits /making withdrawals
- Will receive benefits in the future

Social Security

- Retirement, survivor's, or disability benefits

Other retirement assets

IRAs, Keoghs

- Started directly, or rolled over from pension/account from a former job

Annuities

- Directly purchased annuities

Card #11

Location of their offices

Had the lowest fees/minimum balance requirement

Able to obtain many services at one place

Offered safety and absence of risk

Some other reason

Card #12

Don't write enough checks to make it worthwhile

Minimum balance is too high

Do not like dealing with banks

Service charges are too high

No bank has convenient hours or location

Some other reason

Card #13

Working now/ Self-employed

On vacation/ Other leave of absence

Temporarily laid off

Unemployed and looking for work

On sick leave or maternity leave

Disabled

Retired (full, partial, or temporary)

Student

Homemaker

On strike

Volunteer work

Other

Card #14

PLEASE LIST YOUR STRONGEST IDENTIFICATION FIRST

White

Black/African-American

Hispanic/Latino

Asian

American Indian/Alaska Native

Native Hawaiian/Other Pacific Islander

Other

Card #15

Too expensive, can't afford health insurance

Can't get health insurance because of poor health, age, or illness

Don't believe in health insurance

Not much sickness in the family - we haven't needed health insurance

Dissatisfied with previous insurance

Job layoff or job loss

Some other reason